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IMMEDIATE

FRP:
BRIEF

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[REDACTED]

[REDACTED] PAGE 001
TOT: 250640Z OCT 90 [REDACTED]

SECRET NOFORN NOCONTRACT
BRIEF 250640Z
TO: IMMEDIATE PRIORITY MEA BRIEF

WNINTEL

SUBJECT: HERewith SUPPORT CABLE FOR MIDDLE EAST BRIEF
FOR THURSDAY, 25 OCTOBER 1990.

[REDACTED]

FROM: DDI/O/CPAS.

SUBJECT: MIDDLE EAST AREA BRIEF [REDACTED] FOR THURSDAY, 25 OCTOBER 1990.

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1. IRAQ-KUWAIT: SITUATION REPORT [REDACTED]
2. [REDACTED]
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5. IN BRIEF
6. SYRIA: DEALING WITH A POST-AWN LEBANON [REDACTED]
7. INTERNATIONAL: SUPPLIES OF OIL PRODUCTS VULNERABLE [REDACTED]

Approved for Release
Date JUN 1999

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1. IRAQ-KUWAIT: SITUATION REPORT

AMMAN TIGHTENS SANCTIONS AGAINST IRAQ

JORDAN HAS STOPPED SENDING HUMANITARIAN SHIPMENTS OF FOOD AND MEDICINE, PENDING A REVIEW BY THE UN SANCTIONS COMMITTEE

SOME SMALL-SCALE SMUGGLING TO IRAQ VIA DESERT ROUTES UNDOUBTEDLY CONTINUES.

IT UNDOUBTEDLY HOPES FOR FOREIGN AID TO OFFSET THE SEVERE IMPACT OF SANCTIONS ON THE JORDANIAN ECONOMY. THE REGIME PROBABLY CONTINUES TO BELIEVE IT CANNOT COMPLETELY SEAL THE BORDER WITHOUT RISKING A DOMESTIC BACKLASH.

GULF ARABS FORGIVE EGYPTIAN DEBT

GULF ARAB STATES HAVE WRITTEN OFF NEARLY \$8 BILLION IN OFFICIAL DEBT OWED BY EGYPT. THIS GESTURE BY SAUDI ARABIA, KUWAIT, THE UAE, AND QATAR COMES AS

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PRESIDENT MUBARAK IS TOURING THE GULF.

THE DEBT WRITEOFF SHOWS THE GRATITUDE OF THE GULF MONARCHIES FOR CAIRO'S CONTRIBUTION OF TROOPS TO THE MULTINATIONAL FORCE. IT WILL HAVE LITTLE IMMEDIATE IMPACT BECAUSE CAIRO STOPPED SERVICING MOST OF THESE LOANS IN THE 1970S.

3. PAKISTAN: BHUTTO CHARGES ELECTION FRAUD

BENAZIR BHUTTO'S ACCUSATION THAT YESTERDAY'S ELECTIONS WERE RIGGED IN FAVOR OF THE CONSERVATIVE, ANTI-BHUTTO PARTIES INCREASED THE CHANCES FOR VIOLENCE. BHUTTO CHARGED THAT VOTE FRAUD WILL GIVE HER PAKISTAN PEOPLE'S PARTY (PPP) ONLY ABOUT 50 SEATS OUT OF A TOTAL OF 217; SHE HERSELF LOST ONE OF THE SEATS SHE WAS CONTESTING.

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63 [REDACTED] 63
[REDACTED] SHE REFUSED TO PREDICT HOW THE PPP
WILL REACT TO THE ELECTION RESULTS. 63

63 [REDACTED] 63
[REDACTED] A RESULT OF ONLY 50 SEATS FOR THE PPP SUGGESTS THERE
HAS BEEN RIGGING, ALTHOUGH VOTER DISILLUSIONMENT WITH BHUTTO'S
LACKLUSTER RECORD IN OFFICE MIGHT HAVE PRODUCED A POOR PPP SHOWING
IN ANY CASE. IF BHUTTO'S COUNT IS ACCURATE, SHE FACES THE TOUGH
CHOICE OF ACCEPTING THE ELECTION RESULTS AND SITTING IN OPPOSITION
OR BOYCOTTING THE NEW NATIONAL ASSEMBLY AND POSSIBLY CALLING FOR
PROTESTS AGAINST THE GOVERNMENT. SOME ELECTION-RELATED VIOLENCE BY
THE PPP IS LIKELY; IF IT BECOMES PROLONGED AND WIDESPREAD, MILITARY
INTERVENTION IS ALMOST CERTAIN. 63

4. USSR-MIDDLE EAST: PRIMAKOV RETURNS 63

SOVIET PRESIDENTIAL ENVOY PRIMAKOV ARRIVED UNEXPECTEDLY IN
CAIRO YESTERDAY AND TOLD THE EGYPTIAN PRESS THE OPPORTUNITIES FOR A
PEACEFUL SOLUTION TO THE GULF CRISIS HAVE NOT BEEN EXHAUSTED. HE
ALSO SAID HIS TALKS IN BAGHDAD AND WESTERN CAPITALS HAD PRODUCED
POSITIVE RESULTS. PRIMAKOV PLANS TO BRIEF MUBARAK ON THE TALKS AND
TO TRAVEL TO DAMASCUS, BAGHDAD, AND RIYADH. 63

[REDACTED] 63
ALTHOUGH PRIMAKOV GOT A COOL RECEPTION ON HIS RECENT
TRIP TO EUROPE, MOSCOW PROBABLY HOPES TALKS WITH KEY ARAB LEADERS
OPPOSED TO IRAQ--ESPECIALLY IN EGYPT AND SAUDI ARABIA--MAY ENCOURAGE
THEM TO BE MORE OPEN TO A POLITICAL SOLUTION THAT WOULD LET SADDAM
SAVE FACE. THE RECENT COMMENTS BY THE SAUDI DEFENSE MINISTER,
INTERPRETED BY MANY AS RAISING THE POSSIBILITY OF CONCESSIONS TO
IRAQ, MAY HAVE ENCOURAGED MOSCOW TO SEND PRIMAKOV OUT AGAIN. HE MAY
ALSO BE PREPARING GROUND FOR SOVIET MEDIATION IN THE EXPECTATION
THAT SENTIMENT FOR A COMPROMISE WILL INCREASE AMONG COALITION
PARTNERS AS THE CRISIS DRAGS ON. 63

5. IN BRIEF

AFRICA

X--LIBERIAN REBEL TAYLOR'S REPRESENTATIVES BROKE OFF CEASE-FIRE
TALKS YESTERDAY, CLAIMING WEST AFRICANS FAILED TO GUARANTEE BROADER
PARTICIPATION IN PEACEKEEPING FORCE . . . PROBABLY TRYING TO BOLSTER
POSITION OF TAYLOR'S SUPPORTERS AT ECOWAS SUMMIT NEXT WEEK. 63

SOUTH ASIA

X--INDIAN PARLIAMENT WILL CONSIDER NO-CONFIDENCE MOTION AGAINST
SINGH GOVERNMENT 7 NOVEMBER . . . SINGH LACKS PARLIAMENTARY
MAJORITY, WILL SEEK MORE SUPPORT BEFORE VOTE . . . DISSENT IN HIS
PARTY GROWING. 63

X--INDIA COMMISSIONED SKYLARK VERY-LOT-FREQUENCY TRANSMITTER
SATURDAY . . . WILL EXPAND SUBMARINE OPERATING AREA TO ENTIRE INDIAN
OCEAN, PHILIPPINE SEA, AREAS INDIA REGARDS AS WITHIN ITS ECONOMIC
ZONE. 63

6. SYRIA: DEALING WITH A POST-AWN LEBANON 63

SYRIA HAS SOLIDIFIED ITS HOLD ON LEBANON BY TOPPLING GENERAL
AWN PROBABLY CANNOT MOVE QUICKLY BUT TO DISMANTLE THE LEBANESE
MILITIAS AND PROBABLY WILL RESIST NEGOTIATING THE TERMS OF ITS OWN
WITHDRAWAL TO THE BEKAA VALLEY, BOTH OF WHICH ARE CALLED FOR IN THE

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1989 TA'IF NATIONAL RECONCILIATION ACCORD.

THE SYRIANS ARE PLEASED WITH THE RESULTS OF THE OPERATION TO REMOVE AWN; THEIR GOVERNMENT-CONTROLLED PRESS HAS BEEN TOUTING SYRIA'S ROLE IN HIS DEFEAT. INTERNATIONAL REACTION TO AWN'S OUSTER-- GENERALLY HAS NOT BEEN HARSH, ALTHOUGH SOME CONCERN HAS STARTED TO SURFACE ABOUT SYRIAN INTENTIONS IN LEBANON NOW THAT AWN IS OUT. FOREIGN MINISTER SHARA TOLD US DIPLOMATS THAT SYRIA HAS EVIDENCE THAT SADDAM HUSAYN IS DISMAYED BY THE SUCCESS OF THE OPERATION.

ONE LESS LEVER

THE SYRIANS REGARDED AWN AS AN IMPEDIMENT TO A SYRIAN-BLESSED SETTLEMENT IN LEBANON BUT ALSO AS A TACTICAL TOOL TO USE IN WEAKENING OTHER "IMPEDIMENTS." THEY DELIBERATELY PROLONGED AWN'S STRUGGLE WITH RIVAL CHRISTIAN STRONGMAN SAMIR JAJA, FOR EXAMPLE, BY SUPPLYING AWN WITH FUEL AND AMMUNITION LAST SPRING AND SUMMER. AWN SERVED SYRIA'S INTERESTS BY WEAKENING THE LEBANESE CHRISTIAN COMMUNITY'S ABILITY TO DEFY DAMASCUS AND CONTRIBUTING TO JAJA'S DECISION TO ACCEPT TA'IF AND ACKNOWLEDGE THE LEGITIMACY OF THE HARAWI GOVERNMENT.

SYRIA NONETHELESS RETAINS VARIED MEANS OF INFLUENCE OVER HARAWI'S GOVERNMENT. DAMASCUS HAS STRONG TIES TO AMAL LEADER NABIH BARRI, FORMER LEBANESE FORCES CHIEF ELI HUBAYQA, DRUZE LEADER WALID JUNBALTT, AND SULAYMAN FRANJIEH, WHOSE FAMILY DOMINATES NORTHERN LEBANON. THE SYRIANS CAN DRAW ON THESE ALLIES TO INFLUENCE HARAWI, WHILE AVOIDING THE INTERNATIONAL CRITICISM THAT DIRECT PRESSURE WOULD ATTRACT. DAMASCUS COULD AGAIN RESORT TO POLITICAL VIOLENCE TO CONTROL ITS LEBANESE OPPONENTS, BUT THIS OPTION HAS BECOME LESS ATTRACTIVE AS SYRIA HAS TRIED TO IMPROVE ITS INTERNATIONAL IMAGE.

DISMANTLING THE MILITIAS: THE EASY PART IS OVER

AWN'S OUSTER HAS BROUGHT SYRIA CLOSER TO THE NEXT PHASE OF THE TA'IF RECONCILIATION PLAN, DISMANTLING LEBANON'S MILITIAS, WHOSE FRACTIOUSNESS HAS CONTRIBUTED TO SYRIAN POWER IN THE COUNTRY. DAMASCUS ALREADY HAS ENCOURAGED LEADERS OF ITS CLIENT MILITIAS TO JOIN THE HARAWI GOVERNMENT AND SUPPORT THE TA'IF PLAN.

MORE CONCRETE MOVES TO DISBAND THE MILITIAS WOULD BRING SYRIA INTO CONFLICT WITH SOME OF ITS TRADITIONAL LEBANESE ALLIES, WHO WOULD NOT HAVE SIGNIFICANT POLITICAL OR ECONOMIC CLOUT WITHOUT THEIR MILITIA FOLLOWING.

DISMANTLEMENT OF JAJA'S LEBANESE FORCES, SYRIA'S MOST VOCAL SURVIVING CHRISTIAN OPPONENT, PRESENTS A SPECIAL PROBLEM FOR DAMASCUS. ALTHOUGH JAJA IS PUBLICLY COMMITTED TO TA'IF AND HARAWI HAS STATED HIS WILLINGNESS TO GIVE JAJA A CABINET POST,

HIZBALLAH: LESS MANAGEABLE

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[REDACTED] b3
[REDACTED] b3
[REDACTED] b1, b3
THE JOINT COMMUNIQUE ISSUED LAST MONTH AFTER PRESIDENT ASAD VISITED TEHRAN DID NOT REFER TO TA'IF, SUGGESTING THERE WAS NO BREAKTHROUGH IN SYRIAN EFFORTS TO PERSUADE IRAN TO STOP SUPPORTING HIZBALLAH'S EFFORTS TO ESTABLISH AN ISLAMIC STATE IN LEBANON. SYRIA CONTROLS IRAN'S SUPPLY LINES TO HIZBALLAH AND IN THE PAST HAS HELD UP ARMS AND OTHER SHIPMENTS. ASAD IS UNLIKELY TO DO THIS AGAIN SOON BECAUSE HE WANTS TO AVOID ALIENATING IRAN AND TO KEEP TEHRAN FIRMLY OPPOSED TO IRAQ. [REDACTED] b3

ASAD PROBABLY WILL NOT RAISE THE ISSUE OF DISBANDING HIZBALLAH WITH IRANIAN FOREIGN MINISTER VELAYATI IN DAMASCUS THIS WEEK. ASAD INSTEAD IS LIKELY TO FOCUS ON ENDING THE FIGHTING BETWEEN HIZBALLAH AND AMAL AND TO DISCUSS THE ROLE HE ENVISIONS THE SHIAS MIGHT PLAY-- AND IRAN SHOULD FACILITATE--IN THE NEW LEBANESE POLITICAL SYSTEM. [REDACTED] b3

OTHER CONCERNS

LEBANON IS LIKELY TO TAKE A BACK SEAT TO THE GULF CRISIS IN SYRIA'S REGIONAL CALCULATIONS IN THE NEAR TERM. DAMASCUS MAY LET THE ARAB LEAGUE TO ASSUME A MORE VISIBLE ROLE IN SUPPORTING THE HARAWI GOVERNMENT AS EVIDENCED BY POSSIBLE MOROCCAN AND ALGERIAN PLANS TO SEND TROOPS TO BEIRUT. THE SYRIANS PROBABLY BELIEVE THAT THE ARAB LEAGUE [REDACTED] WILL NOT SERIOUSLY PUSH SYRIA TO IMMEDIATELY HONOR ITS TA'IF OBLIGATIONS--WHICH INCLUDE FACILITATING THE DISMANTLING OF THE MILITIAS AND NEGOTIATING ITS OWN WITHDRAWAL TO THE BEKAA VALLEY WITH THE LEBANESE GOVERNMENT--BECAUSE THEY NEED SYRIA'S MILITARY AND POLITICAL SUPPORT AGAINST IRAQ. [REDACTED] b3 b1, b3

7. INTERNATIONAL: SUPPLIES OF OIL PRODUCTS VULNERABLE [REDACTED] b3

ALTHOUGH THE LOSS TO WORLD MARKETS OF KUWAITI AND IRAQI REFINERIES WILL KEEP UPWARD PRESSURE ON PRICES, PARTICULARLY OF JET FUEL AND KEROSENE, THE WORLD REFINING SYSTEM PROBABLY HAS THE FLEXIBILITY TO SATISFY EXPECTED DEMAND FOR ALL OIL PRODUCTS OVER THE NEXT YEAR. NEVERTHELESS, SUPPLIES REMAIN VULNERABLE BECAUSE REFINERIES ARE OPERATING AT NEAR CAPACITY AND MANY ARE POSTPONING NORMAL MAINTENANCE. EVEN IF THE REFINERIES CAN MAINTAIN OUTPUT, LOCAL SHORTAGES OF ONE OR ANOTHER OIL PRODUCT ARE POSSIBLE IN THE NEXT SEVERAL MONTHS. [REDACTED] b3

UNCERTAINTIES ABOUT CRUDE OIL SUPPLY AND THE LOSS OF SOME EXPORTS OF REFINED PRODUCT FROM THE PERSIAN GULF ARE STRAINING THE REFINING SYSTEM. NOT ONLY ARE CRUDE OIL SUPPLIES LIKELY TO BE SLIGHTLY LOWER OVER THE NEXT YEAR, BUT THE REPLACEMENT CRUDE CONTAINS A GREATER PROPORTION OF HEAVIER OIL. MOREOVER, THE LOSS OF OIL PRODUCTS FROM KUWAIT AND IRAQ [REDACTED] b1, b3

[REDACTED] WILL LEAVE REFINERIES OUTSIDE THE GULF TO PROVIDE OVER 1 MILLION BARRELS A DAY OF ADDITIONAL REFINED PRODUCTS. REFINERIES WILL HAVE MORE DIFFICULTY PRODUCING LIGHT PRODUCTS, WHICH MADE UP ABOUT 70 PERCENT OF THE 46.9 MILLION B/D OF PRODUCT DEMANDED IN NON-COMMUNIST NATIONS LAST YEAR. [REDACTED] b3

THE WORLD REFINING SYSTEM COULD RESPOND TO THESE CHALLENGES IN TWO WAYS:

X--ROUGHLY 2 MILLION B/D OF SPARE PRIMARY PROCESSING CAPACITY IS AVAILABLE AT NUMEROUS REFINERIES AROUND THE WORLD. MUCH OF THIS

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CAPACITY IS LIKELY TO BE TAPPED, ESPECIALLY IN WESTERN EUROPE, BUT IT WILL NOT PRODUCE ENOUGH LIGHT PRODUCTS TO MEET WORLD DEMAND.

X--EXISTING CONVERSION CAPACITY TO TRANSFORM HEAVY PRODUCTS INTO LIGHTER ONES CAN BE USED TO INCREASE SUPPLIES OF LIGHT PRODUCTS. THE UTILIZATION OF CONVERSION CAPACITY WORLDWIDE PROBABLY WILL RISE TO ABOUT 90 PERCENT, WHICH ON AN ANNUAL BASIS IS CLOSE TO FULL CAPACITY.

JET FUEL AND KEROSENE SUPPLIES

BARRING FURTHER DISRUPTIONS IN CRUDE SUPPLIES OR REFINERY OPERATIONS OR UNEXPECTED INCREASES IN DEMAND, PRODUCT SUPPLIES SHOULD BE SUFFICIENT OVER THE NEXT YEAR, ALTHOUGH A RELATIVE DECLINE IN THE AVAILABILITY OF JET FUEL AND KEROSENE WILL FORCE THOSE PRICES UP. SINCE THE INVASION, PRICES FOR THOSE FUELS HAVE RISEN MUCH FASTER THAN PRICES FOR OTHER OIL PRODUCTS. THE WHOLESALE PRICE FOR KEROSENE AND JET FUEL IN ROTTERDAM INCREASED FROM 42 CENTS PER GALLON IN LATE JULY TO OVER \$1.40 IN LATE OCTOBER. DURING THE SAME PERIOD, UNLEADED GASOLINE ROSE FROM 73 CENTS TO \$1.11 PER GALLON, AND HOME HEATING OIL ROSE FROM 54 CENTS TO \$1.04.

THE KUWAITI REFINERIES WERE SET UP TO SUPPLY LARGE QUANTITIES OF JET FUEL AND KEROSENE, AND OTHER REFINERIES WILL BE HARD PRESSED TO MAKE UP THE SHORTFALL. ALTHOUGH NON-KUWAITI REFINERIES SHOULD PRODUCE OVER 4 MILLION B/D OF THESE TWO FUELS--ENOUGH TO MEET POSTINVASION DEMAND AT HIGHER PRICES--PRICE INCREASES WILL PARTICULARLY AFFECT THE INTERNATIONAL AIRLINE INDUSTRY AND CONSUMERS IN ASIA, WHERE KEROSENE IS USED EXTENSIVELY FOR COOKING AND HEATING.

OUTLOOK

ALL PRODUCT PRICES PROBABLY WILL REMAIN UNDER UPWARD PRESSURE IN COMING MONTHS; MANY REFINERIES WILL NOT INCREASE THEIR PROCESSING OF CRUDE UNLESS PRICES FOR THE FULL RANGE OF PRODUCTS RISE PROPORTIONATELY MORE THAN CRUDE PRICES. IF CRUDE OIL PRICES AVERAGE \$30 TO \$40 PER BARREL NEXT YEAR, AS EXPECTED--ABSENT HOSTILITIES IN THE GULF REGION--AVERAGE PRICES FOR MOST PRODUCTS FOR THE YEAR PROBABLY WILL BE 25 TO 50 CENTS PER GALLON ABOVE PREINVASION LEVELS.

PRODUCT SUPPLIES WILL BE EVEN TIGHTER--CAUSING MUCH HIGHER PRICES--IF MAJOR CRUDE OIL OR REFINING DISRUPTIONS OCCUR FOR SUSTAINED PERIODS AS A RESULT OF ACCIDENTS, TECHNICAL FAILURES, LABOR STRIKES, SABOTAGE, OR WAR DAMAGE. THE WORLD'S CRUDE OIL PRODUCTION AND REFINING SYSTEM WILL BE RUNNING AT FULL CAPACITY, LEAVING VIRTUALLY NO CUSHION TO OFFSET A SIGNIFICANT DISRUPTION. EVEN WITHOUT A REFINERY DISRUPTION, LOCALIZED SHORTAGES COULD OCCUR FOR MANY REASONS, INCLUDING HARSH WEATHER OR GOVERNMENT POLICIES TO HOLD DOWN PRICES. ATTEMPTS TO RECTIFY SHORTAGES IN ONE REGION OR IN ONE PRODUCT WOULD TIGHTEN SUPPLIES IN OTHER MARKETS AND RAISE WORLD PRICES.

SELECTED OIL PRODUCTS AND THEIR USES

MOTOR GASOLINE IS A LIGHT PRODUCT THAT INCLUDES A MIXTURE OF VOLATILE HYDROCARBONS INTENDED TO FUEL SPARK-IGNITION ENGINES.

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NAPHTHA IS ANOTHER LIGHT PRODUCT WITH DIFFERENT GRADES USED AS PETROCHEMICAL FEEDSTOCKS; IN MILITARY TURBOJET AND TURBOPROP AIRCRAFT ENGINES; AND AS PAINT THINNERS, CLEANERS, AND SOLVENTS.

KEROSENE IS A RELATIVELY LIGHT PRODUCT USED IN SPACE HEATERS, COOKING STOVES, WATER HEATERS, AND WICK LAMPS; SOME GRADES ARE INTENDED FOR COMMERCIAL AND MILITARY AIRCRAFT.

DISTILLATE FUEL OIL IS A GENERAL CLASSIFICATION AT THE HEAVIER END OF LIGHT PRODUCTS THAT INCLUDES FUEL OIL FOR DOMESTIC HEATING OR LIGHT INDUSTRY USES AND DIESEL ENGINE FUEL FOR ON- AND OFF-HIGHWAY VEHICLES, INCLUDING RAILROAD ENGINES AND AGRICULTURAL MACHINERY.

RESIDUAL FUEL OIL IS A HEAVY PRODUCT AND INCLUDES HEAVY OILS THAT REMAIN AFTER THE DISTILLATE FUEL OILS AND LIGHTER HYDROCARBONS ARE DISTILLED AWAY IN REFINERY OPERATIONS. IT IS USED IN STEAM-POWERED VESSELS, COMMERCIAL AND INDUSTRIAL HEATING, AND ELECTRIC POWER GENERATION, AS WELL AS TO POWER SHIPS.

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